PTOS 6.0

New Features Guide

Volume 1

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PTOS 6.0

PTOS Documentation

Introducing the new portable online version of the Documentation module of PTOS. Access your Documentation from any Internet enabled computer or mobile device. The following is a breakdown of the newly updated module.

My Schedule – Access your Schedule from any internet enabled computer.

My Notes – Access your Notes from any internet enabled computer.

Patients – Search a list of Patients.

Reports – Generate a report of Documentation data.

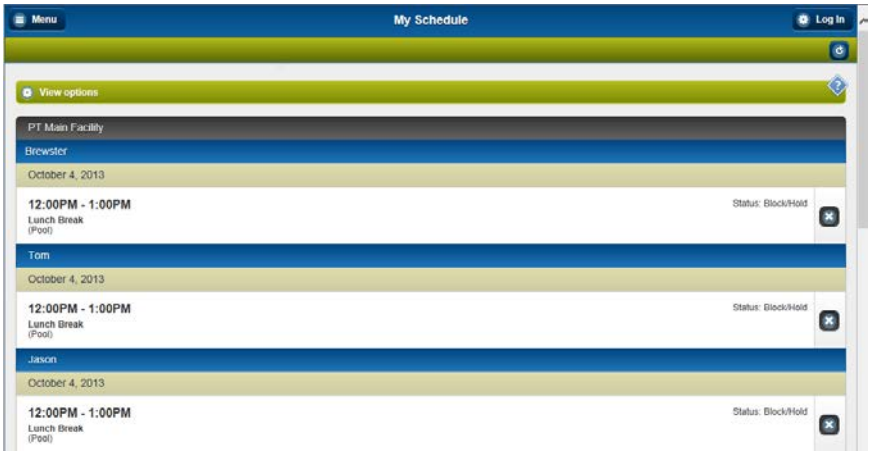
Documentation Setup – Customize your Documentation Templates.

Settings – Store your Account information and select security settings.

Signing Out

Use the **Sign Out** button when closing PTOS Web before closing the browser window.

My Schedule

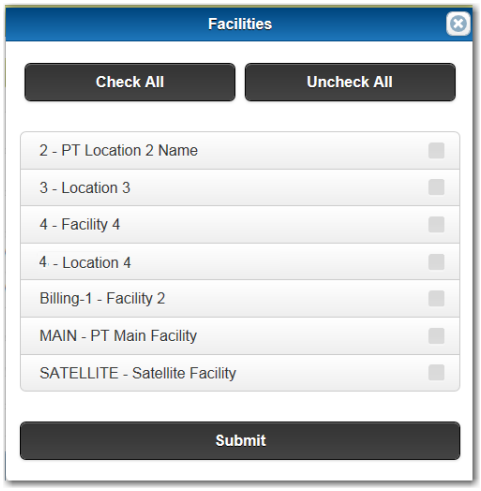


Select **My Schedule** to view a web-based version of your schedule. Select **View Options** to customize your display.

View Options

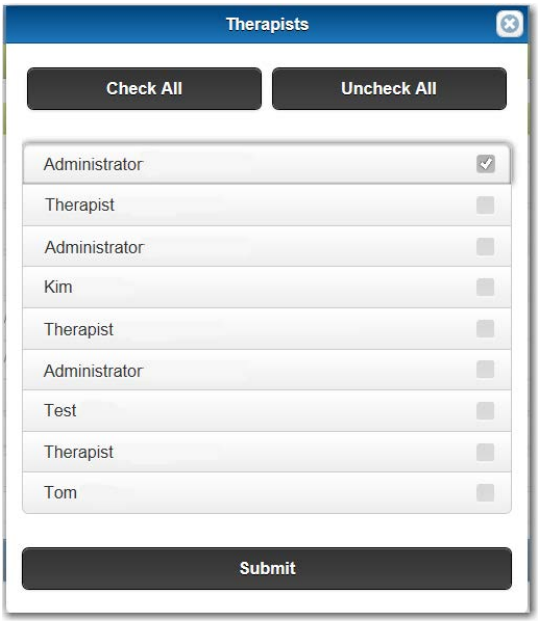
In the **View Options**, select the drop-down arrow to open each option. Select from the following options:

Facilities



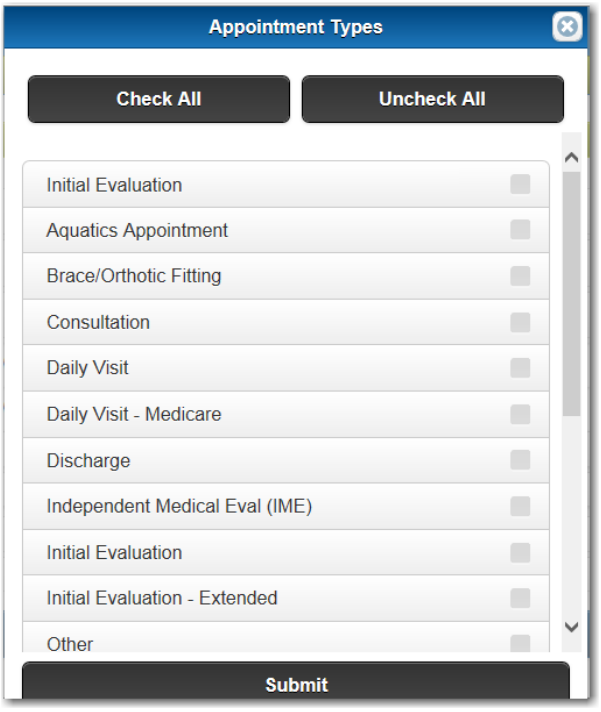
In the **Facilities**, select the checkbox to filter your schedule by location.

Therapists



In **Therapists**, select the checkbox to filter your schedule by therapist. Multiple options can be selected.

All Types



In **All Types**, select the **Appointment Types** to filter your schedule by type. Multiple options can be selected.

Dates and Additional Options

In the **Appointment date from** area, enter a 'from' and 'to' date to filter your schedule by a specific date range.

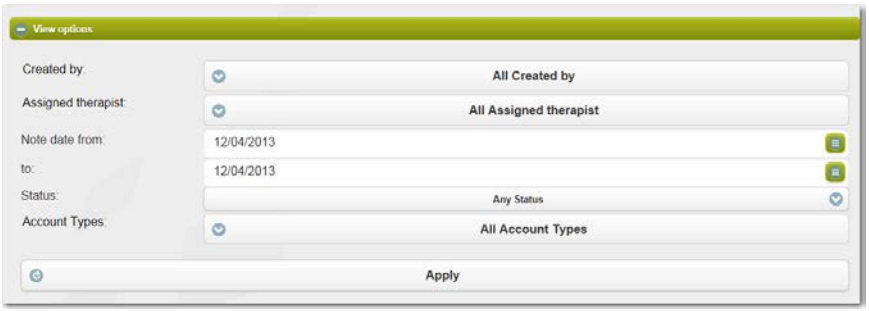
Select the checkboxes to **Show cancel/no show appointments** if you wish to include them in your schedule.

Select the **open time** checkbox to include the unscheduled times on your schedule.

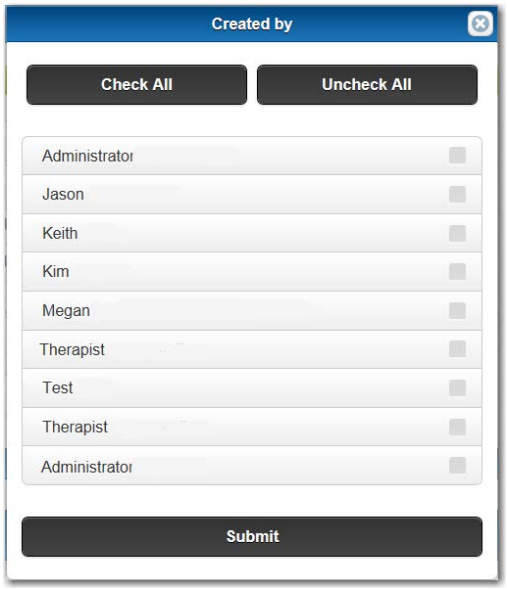
My Notes

Select **My Notes** to view your notes. Use this area to create new notes and make updates.

View Options

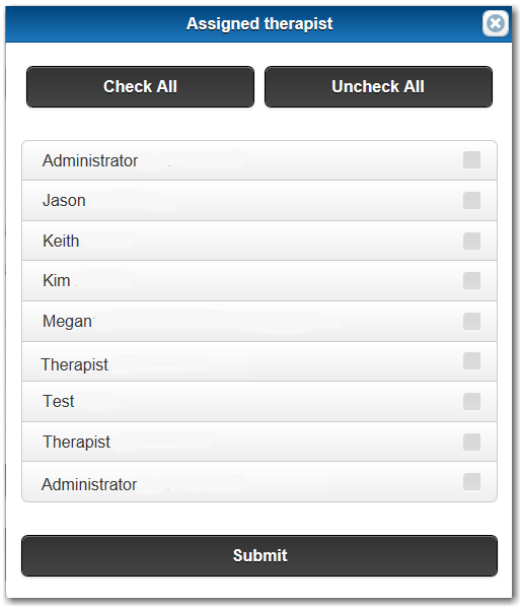


Created By



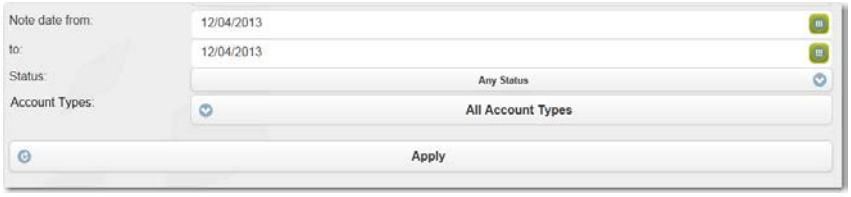
Select the checkbox for the available user or use the **Check All** and **Uncheck All** buttons to select the creator. Select **Submit**.

Assigned therapist



Select the checkbox for the available user or use the **Check All** and **Uncheck All** buttons to select the therapist. Select **Submit**.

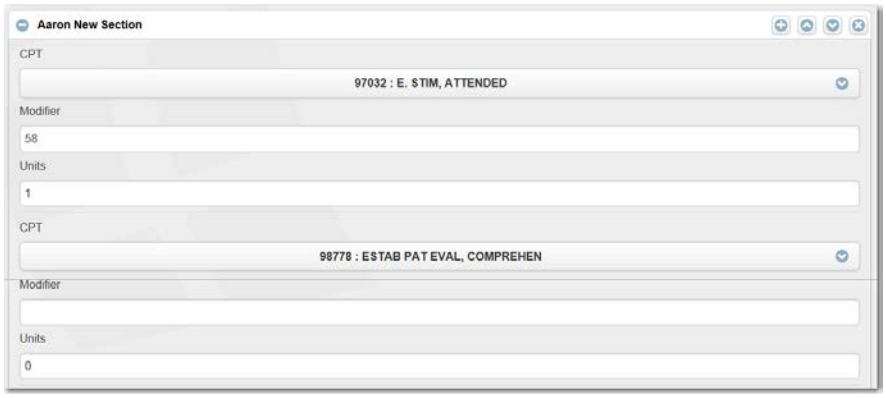
Note Dates and Statuses



Use the available fields to record the Dates, **Status** and **Account Types**. Select **Apply**.

To Edit an existing Note

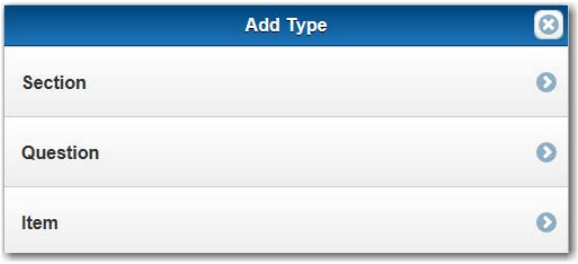
To edit an existing note, select the desired note. Enter the **Note Name**, **Note Date** and **Account Type**.



Enter the **CPT**, **Modifer** and **Units**.

Once you have finished entering the note information, select **Save** to save this note. Select **Close Note** to exit without saving.

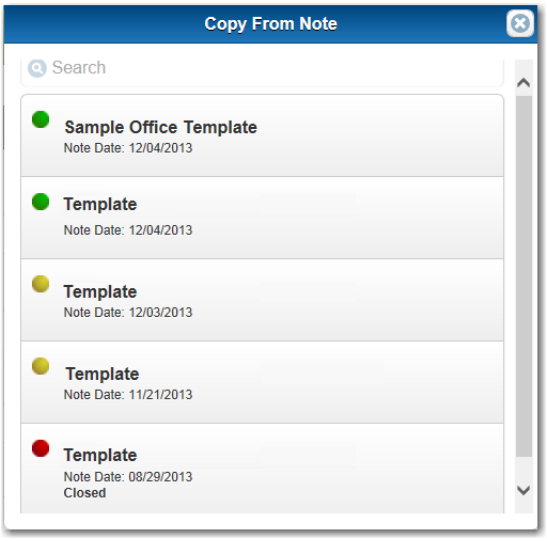
Add Note Type



Select the **Add to Note** button to add a Type.

- Select **Section** to add a section to the exiting note.
- Select **Question** to add a question to the existing note.
- Select **Item** to add an item to the existing note.

Copy From



Select **Copy From** to add a component from another note to this exiting note. The color system shows **Green** for today's notes, **Yellow** for open notes older than the current date and **Red** for closed notes.

Print/Preview

Select the **Print/Preview** button to create a printed note or an email/fax note.

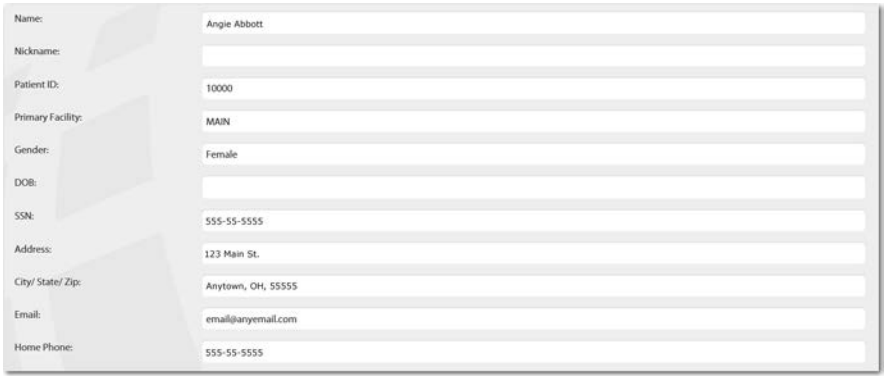
Patients

To search for Patients, select the Patients menu. In the **Search By** field, use the drop-down menu to select from the following options:

- **Last Name**
- **First Name**
- **Patient ID**
- **Phone**
- **Facility ID**

Select the search field and enter the desired criteria for your search. Select **Enter** on your keyboard to search.

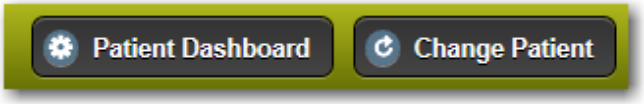
Patient Viewer



Select a Patient from the **Patient List** to open them in the **Patient Viewer**.

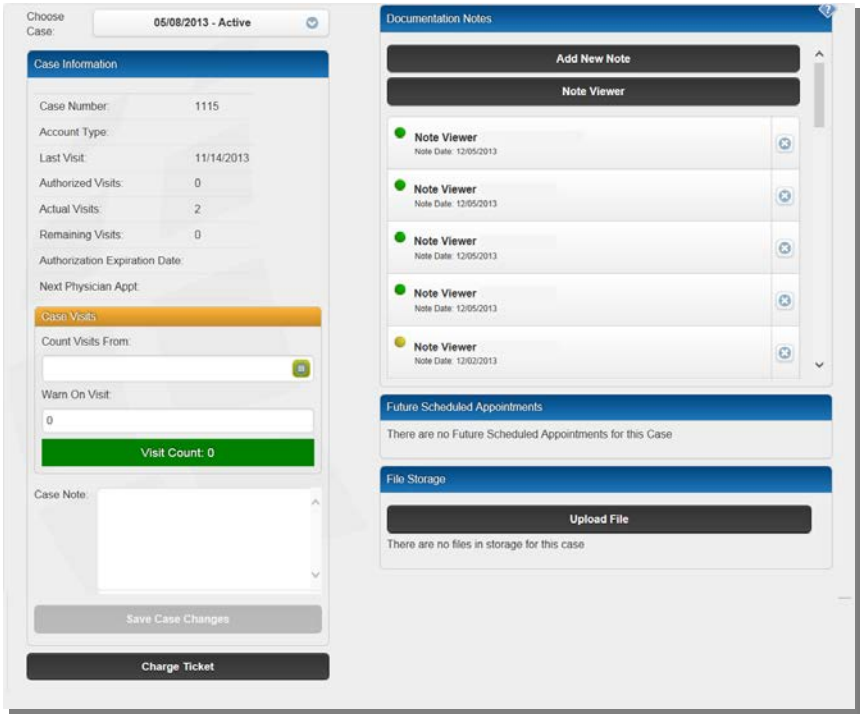
In here, you can view patient information using the tabs:

- **Patient**
- **Case**
- **Referral**
- **Bill**
- **Insurance**
- **Emergency Info**



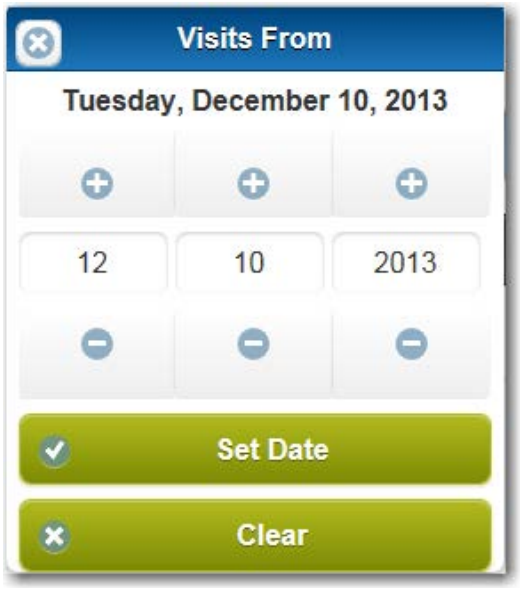
Use the **Patient Dashboard** to view patient notes, case information, scheduled appointments, visit statistics, upload a File for **File Storage** and create a **Charge Ticket.**

Patient Dashboard



The Patient Dashboard lets you manage your notes in one location.

Count Visits From – Select the Date Picker button to enter a date range.

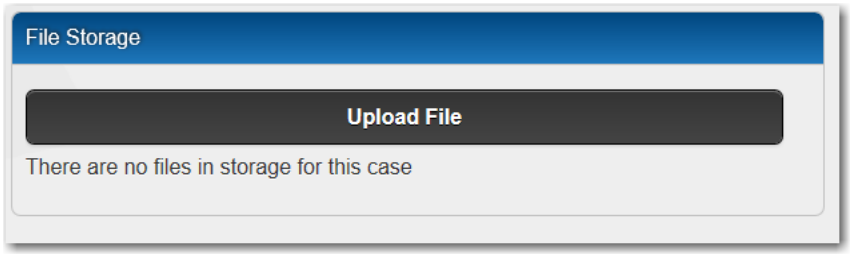


Save Case Changes – Once changes are made, select this button to save.

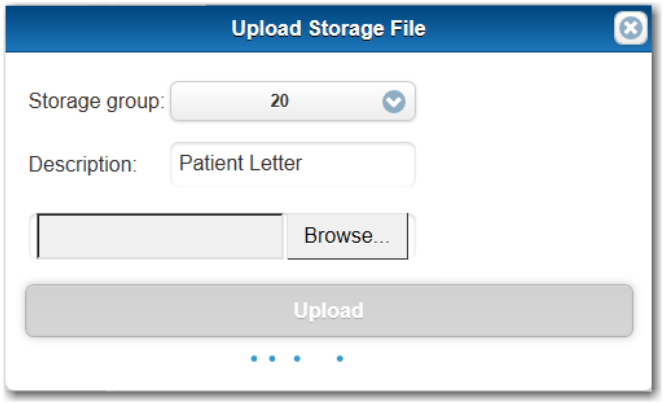
Add New Note – Select this option to add a New Note.

Note Viewer – Use the available button to either link to appointment or delete the note.

File Storage

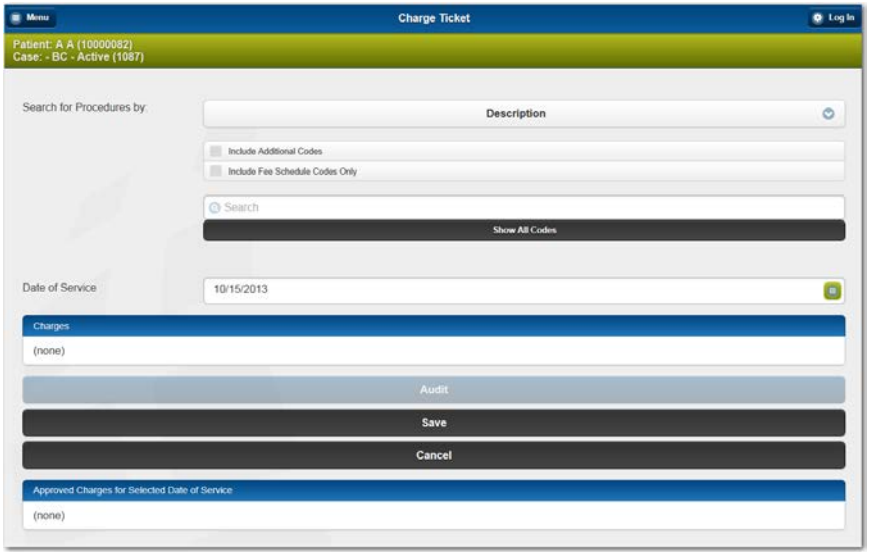


Select the **Upload File** button to attach a file to a File Storage location.



Use the drop-down list to select a **Storage** group. Enter a **Description**. Select **Browse** to locate the desired file. Select the **Upload** button.

Charge Ticket



In the **Charge Ticket**, select the drop-down menu to choose **Description** or **Procedure Code**.

Select the checkboxes to **Include Additional Codes** and/or **Include Fee Schedule Codes Only**.

Place your cursor in the Search field to enter a code or select the Show All Codes button. Select Add checked item to the Charge Ticket to add the code to the ticket.

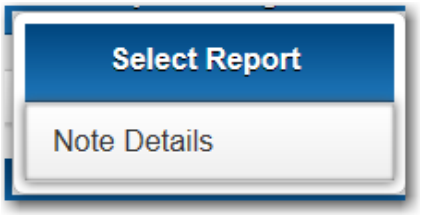
Enter the date of serve, use the defaulted date or select the calendar button to choose the date. NOTE: changing the date of service will reset the Charge Ticket.

Select Save to save the charge ticket. Select **Cancel** to exit the charge ticket without saving.

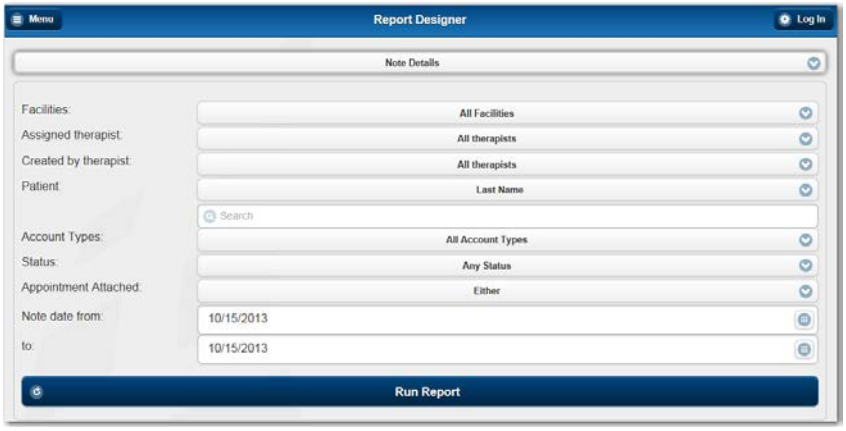
Reports

Report Designer

To choose a report, click Select **Report**.



Choose a report from the list.



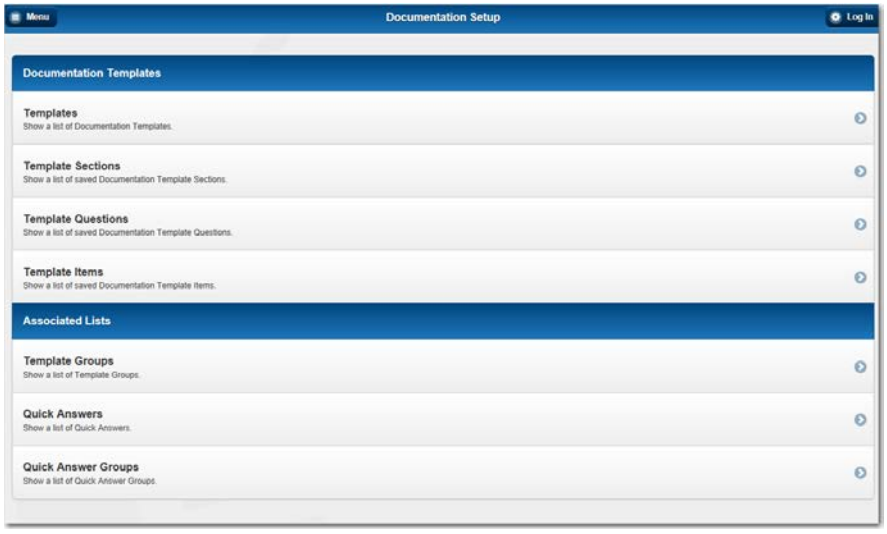
Use the drop-down menus to select:

- **Facilities**
- **Assigned therapist**
- **Created by therapist**
- **Patient**
- **Account Types**
- **Status**
- **Appointment Attached**

Enter the **Note date from** and **to** or use the calendar button.

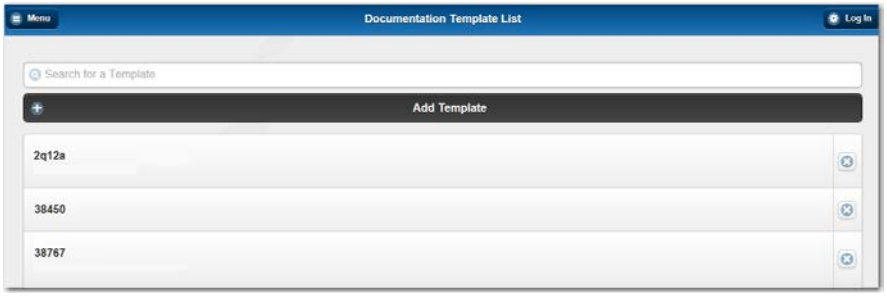
Select **Run Report** to generate a report.

Documentation Setup



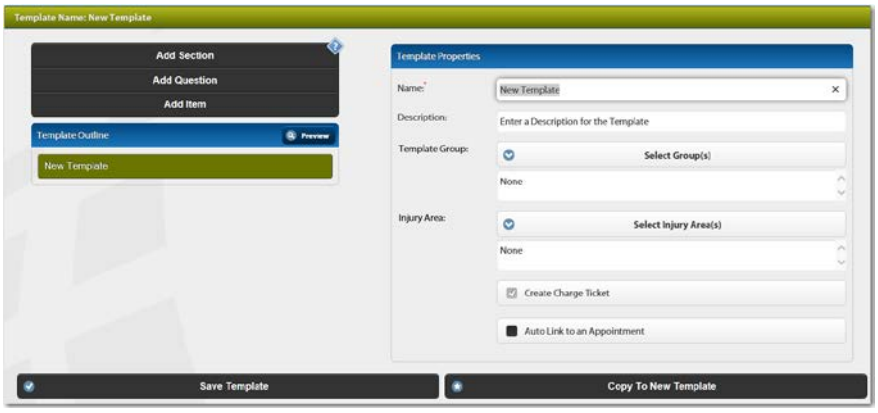
In the **Document Setup**, create and edit **Document Templates**, **Template Sections**, **Template Questions** and **Template Items**.

Templates



In **Documentation Template List**, use the search field to locate an existing template or select the **Add Template** button to create a new template.

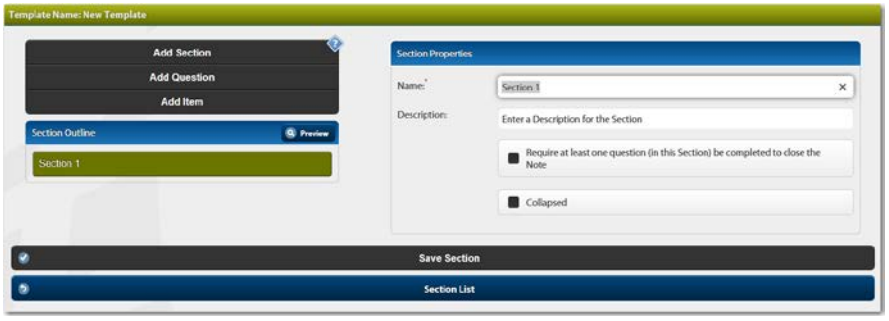
New Template



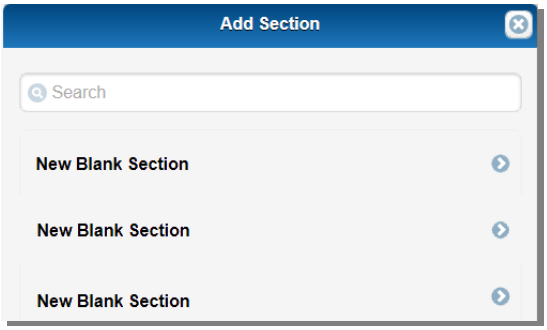
In the **New Documentation Template**, enter the desired information or use the buttons to add information.

Add Select **Save Template** to save changes to the **Template**.

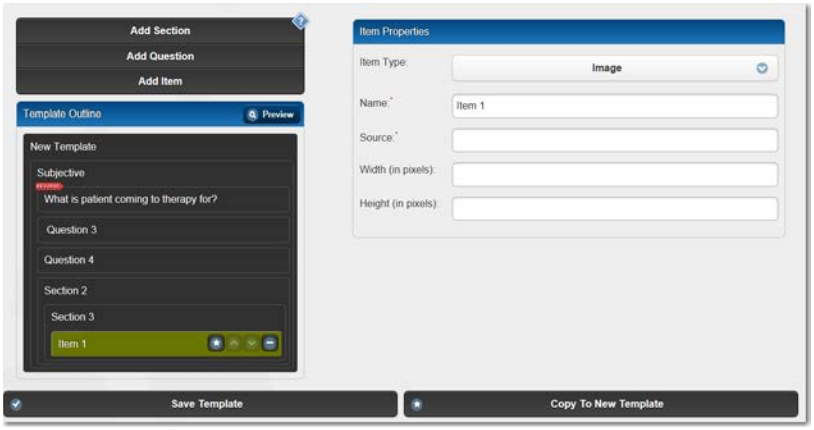
Section



Select the **Add Section** button to add a section to the new template.



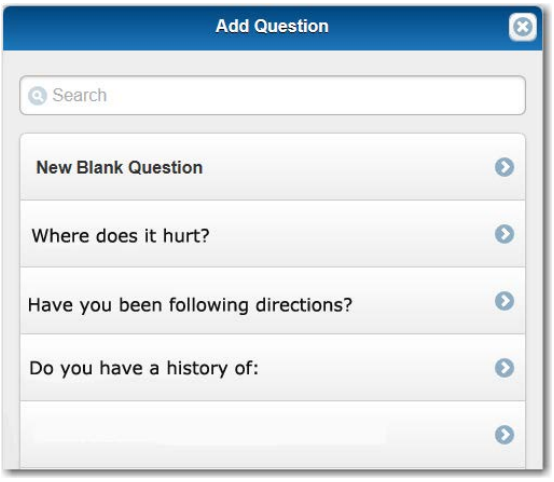
The **Add Section** menu appears. Use the **Search** field to locate a section or select from the available options.



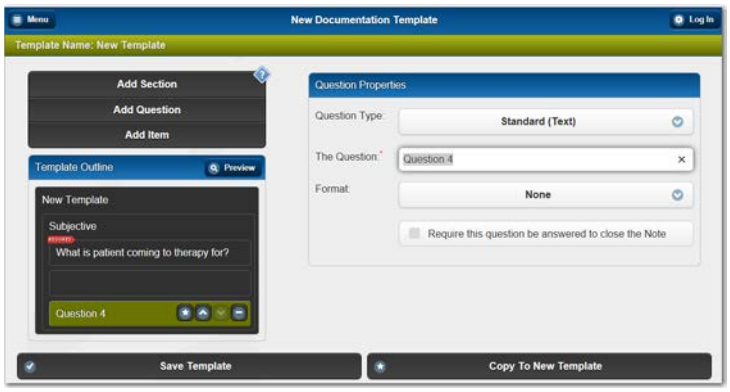
In the **Section Properties**, enter a **Name** and **Description**. Select the checkboxes for **Require at least one question (in this Section) be completed to close the Note** or **Collapsed**, if desired.

Select **Save Template** to save changes to the **Template**.

Add Question



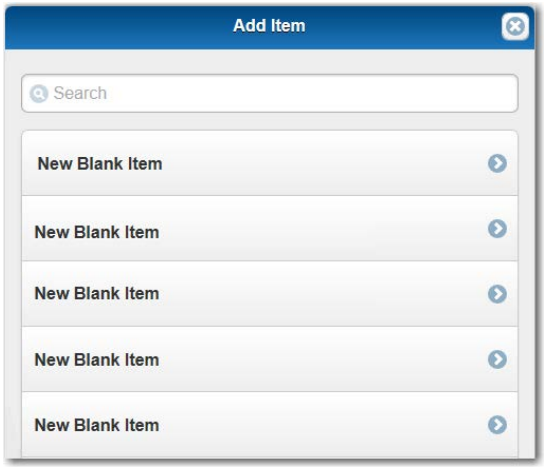
Select the **Add Question** button to add a question to your new template. Use the **Search** to locate a question or select a question from the menu.



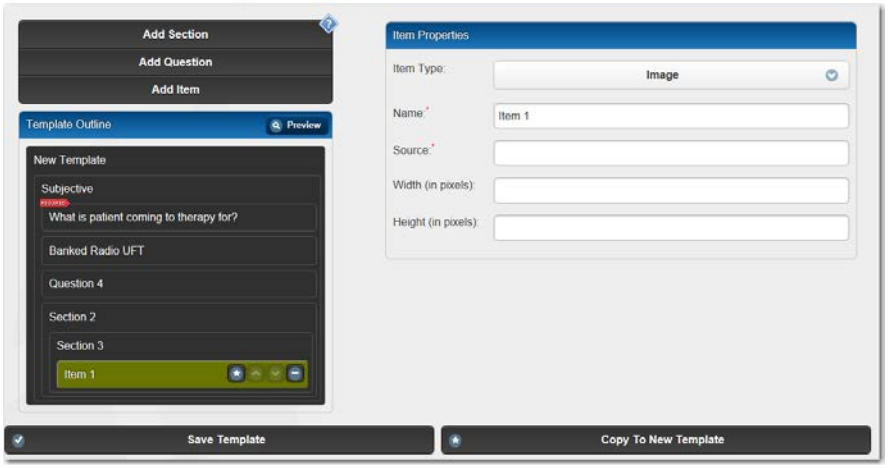
In the **Questions Properties**, enter the **Question Type**, **The Question** and select the **Format**. Select the checkbox **Require the question be answered to close the Note**, if desired.

Select **Save Template** to save changes to the **Template**.

Add Item



Select the **Add Item** button to add an item to your new template. Use the **Search** to locate an item or select an item from the menu.



In the **Item Properties**, select the **Item Type** and enter the **Name**, **Source**, **Width** and **Height**.

Select **Save Template** to save changes to the **Template**.

Template Groups

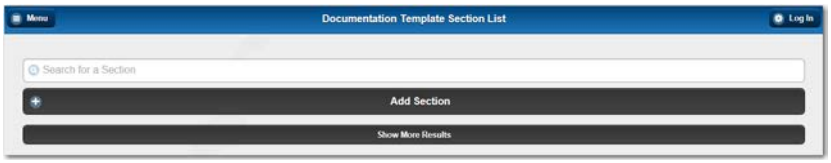
In the **Template Groups**, enter a Template in the **Search** field or select a Template from the menu. Select **Add Template Group** to create a new group.

Select a template and select **Submit**.

Injury Area

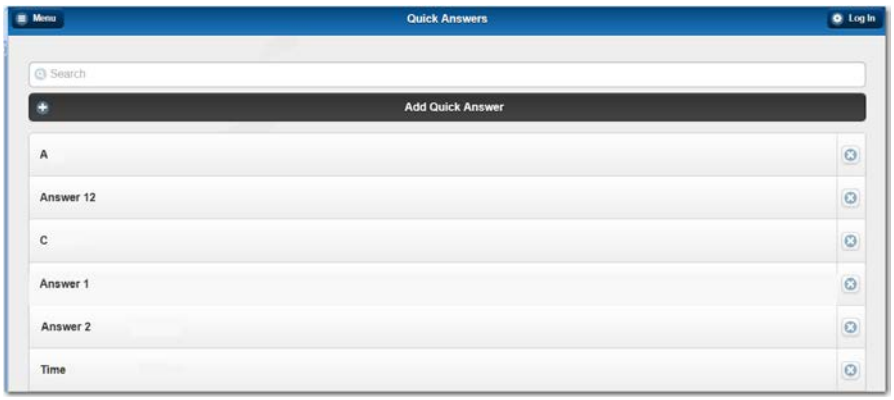
Select an injury area to be added to the template.

Template Sections



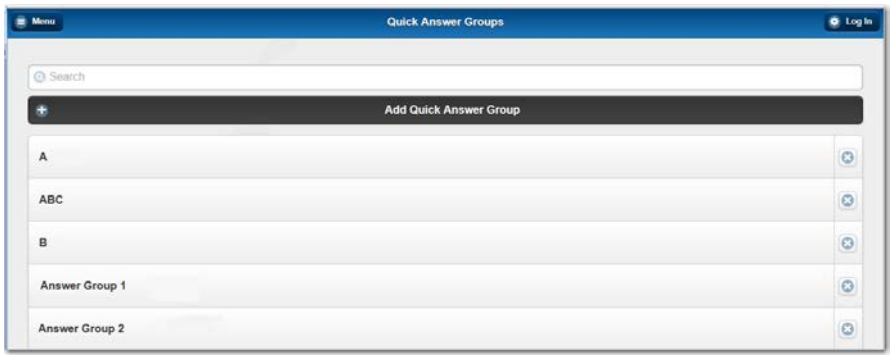
In the Template section, select a Template from the available options. Use the **Add Section** area to make changes to an existing template.

Quick Answers

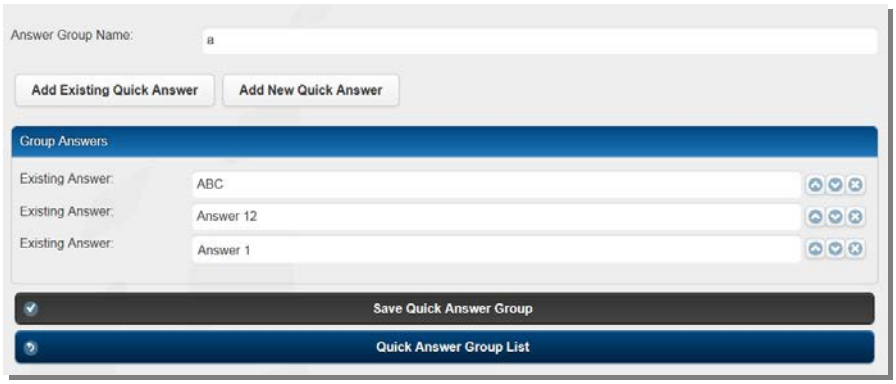


In the Quick Answer section, select a Quick Answer from the available options. Select the **Add Quick Answer** button to add Quick Answers to the list.

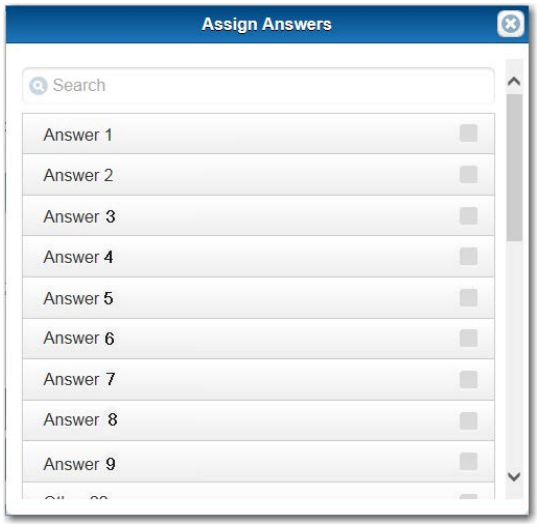
Quick Answer Groups



Select a **Quick Answer Group** from the available options or select **Add Quick Answer Group** to create a new group.



Select **Add Existing Quick Answer** to open a menu of existing answers.



Select the desired answer and then select the **Submit** button at the bottom of the menu.

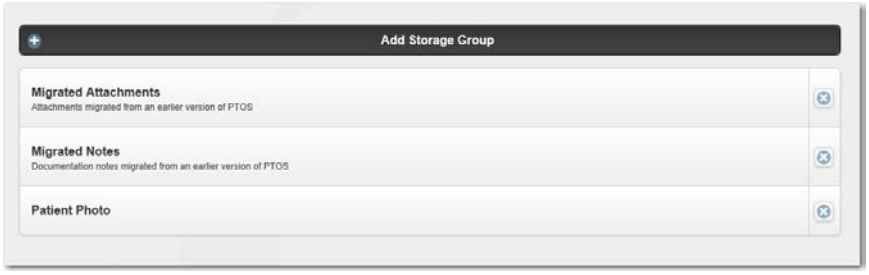
Select the **Add New Quick Answer** button to add a new Answer to the **Quick Answer Group**.

Use the Up arrow, Down arrow and Delete ‘x’ to reorder or remove the answer.

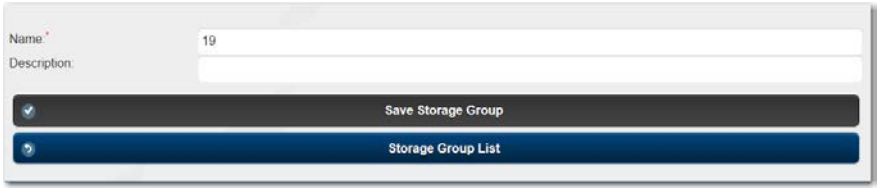
Select **Save Quick Answer Group** to save the selected answer group.

Select **Quick Answer Group List** to return to the main **Quick Answer** menu.

Storage Groups


Add Storage Group
Migrated Attachments
Attachments migrated from an earlier version of PTOS
Migrated Notes
Documentation notes migrated from an earlier version of PTOS
Patient Photo

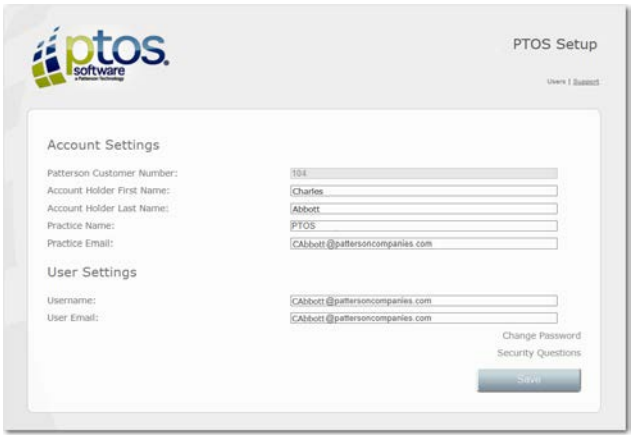
Select **Storage Groups** to edit or create **Storage Groups**. Select **Add Storage Group** to create a new group or select an existing Storage Group to edit.



Enter or edit the **Name** and **Description** of the Storage Group. **Select Save Storage Group** to save. Select **Storage Group List** to return to the main Storage Group list.

Settings

Select the Settings button to make changes to your account information.



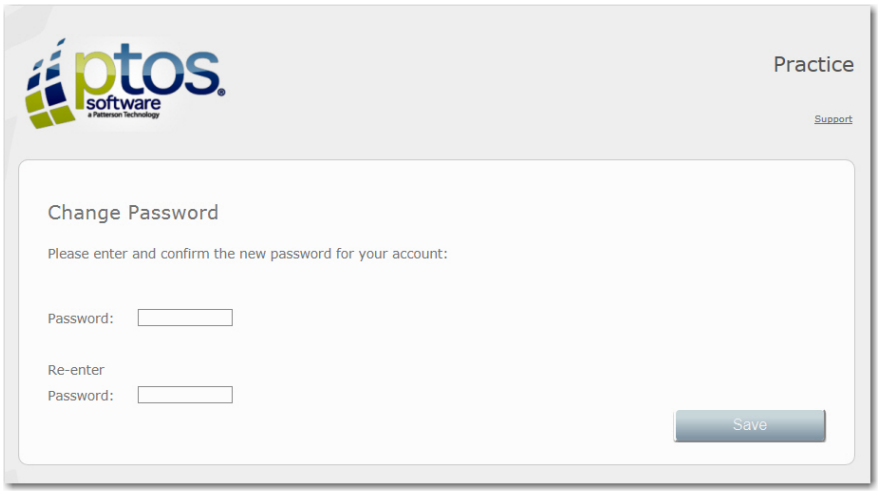
Under Account Settings, view your Customer Number, First and Last Name, Practice Name and Practice Email. Under User Settings, view your Username and User Email.

Select the **Change Password** link to input a new password.

Acceptable passwords must contain:

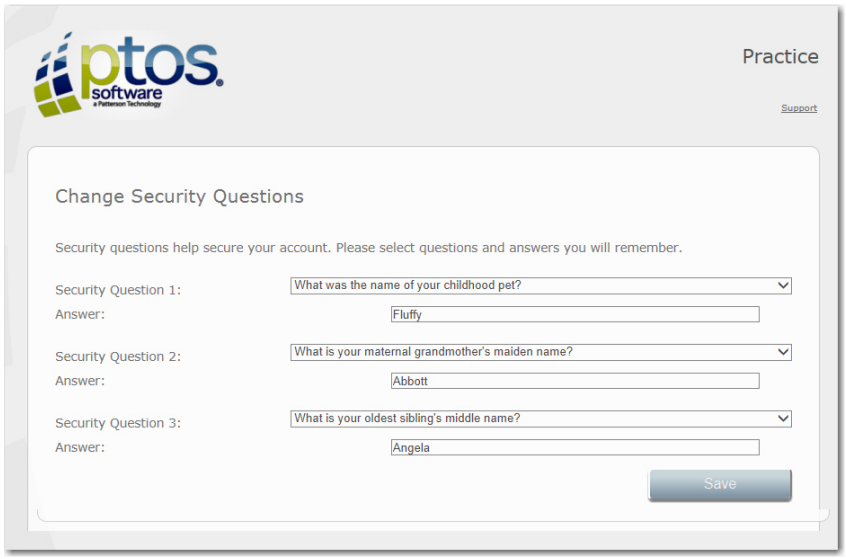
- At least 8 characters
- One capital letter
- One special character
- One number

An example of a correct password might be Pas5word*



To change your password, enter your desired password and then re-enter that same password as verification. Select **Save**.

Select the Security Questions link to view or revise your Security Question information.



To set your security questions, use the drop-down menu to select a **Question** from the available options. Then enter the answer in the **Answer** field. Repeat this process until all three question-and-answer pairs have been set. Select the **Save** button to save your changes.